



Individual Development Accounts Education Plan

Congratulations on taking a step toward furthering your education!

Prior to opening an IDA for education you must complete two requirements.

- 1) You must first complete “Paying for College” online class at www.educationcents.org. After finishing the class, please print out the certificate of completion.
- 2) You must meet with, and be approved by, an Educational Opportunity Center advisor. During this meeting the advisor will review your personal situation and determine whether or not post-secondary or vocational education is a reasonable goal at this time. If you are determined ineligible at this time, you will be given steps to improve your personal situation, and you are invited to apply again when your situation changes.

To set up your appointment please call 303-629-9226. ***Please identify yourself as an IDA client.*** You will need to bring to your appointment:

- Completed Education Plan
- Completed Educational Opportunity Center Intake Form
- Copy of your most recent tax return
- “Paying for College” Certificate of Completion

PLEASE NOTE: If you are unsure of your career or educational goals you may complete a Career Assessment session at the Educational Opportunity Center prior to completing the Education Plan.



Individual Development Accounts Education Plan

Student Name: _____

IDA Participant Name: _____

IDA Facilitator Name: _____

1. Information for the school you plan to attend while using IDA funds:

Name of Institution			
City and State			
Major			
Type of School	2-year 4-year training graduate vocational technical		
Type of Degree you plan on obtaining		How long will it take for you to complete this degree?	
Are you currently a student at this institution?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how long have you attended this institution?	

2. Description of the Course of Study

Please describe your major area of study and how it fits into your career plan.

3. Description of Career Options

Describe the general career options that will be open to you when you complete your education.

4. Financial Information (complete to the best of your ability)

Source of Funds

1. IDA Savings & Match	\$_____
2. Scholarships	\$_____
3. Grants	\$_____
4. Available work income	\$_____
5. Other Savings	\$_____
6. Gifts	\$_____
7. Student Loans	\$_____
8. Other Loans	\$_____
Total	\$_____

Use of Funds

1. Tuition	\$_____
2. Fees	\$_____
3. Books	\$_____
4. Supplies	\$_____
5. Living Expenses	\$_____
6. Equipment	\$_____
7. Transportation	\$_____
8. Child Care	\$_____
Total	\$_____

This page to be completed by an approved educational advisor

Client has made educated decision regarding institution and area of study ☐

Earnings projection: \$_____ to \$_____

Cost of attendance (use): \$_____

-

Financial assistance projection (source): \$_____

=

Remaining balance for student: \$_____

Admissions completed ☐

FAFSA completed ☐

Scholarship search review ☐

I verify that I have received and reviewed this education plan with this student. We discussed their education plan for _____ hour(s). ***One hour is the minimum requirement.***

I believe that an IDA account for education is:

Appropriate for this client ☐

Not appropriate at this time for the client ☐

If the IDA is not appropriate at this time, the following steps need to be taken before opening an IDA for education:

1) _____

2) _____

3) _____

4) _____

Additional comments _____

Education Counselor Name: _____

Signature _____ Date: _____